



**IDEAL Mediation Inc.
Joint Planning Agenda**

1. Confirm the expectation for the results of the mediation.
2. Sign the retainer contract.
 - a. Open or Closed Mediation;
 - b. Proportional of Fees;
 - c. Importance of full disclosure
3. Collect the retainer and issue receipts.
4. Confirm the topics and the order they shall be mediated.
5. Discuss individual priorities:
 - a. Review the Factor Analysis template;
 - b. The difference between market and perceived value;
 - c. What is informed consent;
6. Review documentation requirements.
 - a. Agree to a date of separation;
 - b. Who has access to what documents;
 - c. Estimated time to collect the outstanding documentation;
7. Recommended areas of professional advice.
 - a. What professional do you have access to?
 - b. Is conflict of interest a concerns for the professional you know?
8. Schedule first mediation session.